Purpose in Practice:

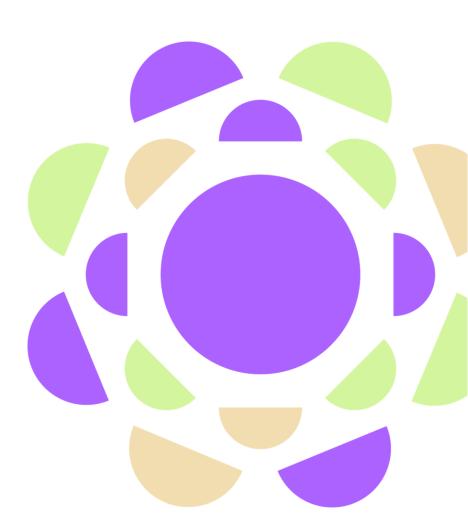
Building a shared understanding of purpose-driven business



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About this Playbook

What is it?

The purpose-led business movement is growing, with more organisations than ever looking to prioritise the planet and its people, while doing so profitably. Practices to encourage that transformation have yet to be codified, but practitioners are constantly learning about what helps – and what doesn't. This Playbook is borne from the experiences of The Purpose-in-Practice Community's (PIPC) research into how to help their organisations become 'purpose-driven'. Specifically, the contents of this playbook provide a perspective on how to cultivate and sustain a shared understanding of purpose-driven business.

PIPC's intent is that this Playbook should be a living document, containing the most up-to-date information about how shared understanding happens. It will include practices, tips and techniques that people have found helpful. However, it will never be the complete story. Instead, it will reflect the ongoing nature of working with Purpose while supporting practitioners through the complexity of growing purpose work in their organisation. The hope is that users will update it with their own experience as they experiment.

Who is it for?

This Playbook is for those who are curious about bringing Purpose-driven business principles and practice alive in their organisation. Perhaps you have an explicit role in embedding purpose, sustainability, or are a leader looking for practical ways to nudge and grow greater shared understanding of purpose in your organisation. Or maybe you are a facilitator or consultant working with many organisations. Whatever your role, we hope there are ideas here to inspire you.

What does it cover?

In this Playbook you will find PIPC's practice findings and our initial 'how to' guide for cultivating shared understanding of purpose-driven business over time. It outlines example approaches that may help you and your organisation develop the personal qualities and practices to be successful and more at ease with this work. This dual focus on your own capabilities, alongside those of your organisation's, is a common thread throughout this work.





About this Playbook

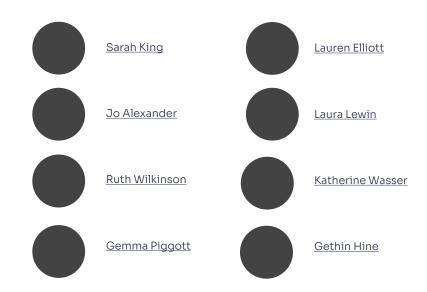
Who can I contact for support

Throughout this Playbook, a number of The Purpose-in-Practice Community members have shared their experiences via short videos. To support you in your journey, those listed below have offered to be contacted to

- explore the background and findings on shared understanding;
- 2. think through how some of the approaches can be applied in your context and
- share their own experiences of trying to put some of this work into practice.

Note: They do not position themselves as 'experts' but rather peers who have some experience of this and are learning with and alongside you.

We suggest making contact after you have completed the <u>diagnostics in Stage 2</u>.







About us: The Purpose-in-Practice Community

About us What is The Purpose-in-Practice Community?

The Purpose-in-Practice Community (PIPC) brings together senior leaders and changemakers to collectively explore how they can put people and the planet at the heart of business and organisational success. Making this shift is complex and multi-layered, and there is no rulebook to follow. The process of becoming purpose-led not only involves substantial shifts in strategy and culture, but fundamental changes to the beliefs and assumptions that underpin how an organisation creates value for all its stakeholders – and for society.

On convening its founding community members, it became apparent that the purpose-led business movement is growing, with more businesses committing to transform, and an increasing volume of definitional frameworks and standards available to anchor credibility. However, while many of these frameworks describe the 'what' and 'why' of <u>purpose-driven business</u>, the 'how' is missing in terms of clear and accepted practices to achieve these standards. Decoding and unlocking these practices is the work of this community.

This collaborative network hopes to develop the potential and power to contribute to changing the landscape of business. Together, we intend to drive both organisational change and larger systemic shifts that create the conditions for purpose-led businesses to thrive.



The members:

People who are passionate about businesses adopting a purpose-driven approach.

The vision:

A better world, accelerated by better business.

- From: Business optimised primarily for growth and profit (shareholder value)
- Towards: Business optimised for human wellbeing and a sustainable ecosystem; with growth and profit in service of that (mutual value)

The mission:

Creating space for catalysts to learn and innovate together; building confidence and resilience to transform businesses for better.

The objective:

Create and grow a network of catalysts to work together to accelerate the transition towards purpose-driven business.

The Principles

- 1. Invite people in
- 2. Grow connections
- 3. Create breakthroughs
- 4. Champion progress

To connect, you can find us on $\underline{\mathsf{LinkedIn}}$ or scan the QR to connect via WhatsApp.



About us What are we focussed on?

In 2022, founding members convened to explore the priority questions and organisational practice evolution required to catalyse purpose-driven business. The first chapter of 'Labs' emerged – a format we use to connect and create breakthrough thinking and practice.

Lab 1: Building Shared Understanding

How might we create and sustain understanding of what it means to be purpose-driven?

Lab 2:
Culture,
Engagement
&
Experience

How might we ignite, cultivate and sustain purpose within and across organisational boundaries; creating the conditions necessary for people & purpose to thrive?

Lab 3: Strategy, Impact & Performance

How might we make purpose core to strategy and performance; appreciating new forms of value and accountability?

Lab 4: Leadership & Capability

How might we reimagine leadership in the context of purpose – and what are the resources and competencies we need to bring about systemic change?

Lab 5: Decision Making & Dialogue

How might we embrace dialogue and constructive tension to navigate difficult decisions, creatively? Lab 6: Product & Proposition

How might we design products and propositions that deliver good outcomes for people and planet? Lab 7: Systems Change

How might business work together to influencing and create wider systems change?



The Playbook:

Building shared understanding of purpose-driven business

Getting started and considerations

Building shared understanding between people – and across organisations – is a complex, non-linear and ongoing challenge. As people join and leave a business, needs and narratives change and contexts and understanding shift. Outcomes cannot always be linked back to particular interventions, and the work often asks for us to work at a deeper level than that required by the status quo. As such, it can create tensions, be ambiguous, and – at times – go against established ways of working in organisations.

Our experience is that success in working with Shared Understanding and Purpose requires us to find new ways in which to work, both personally and with others. And that these ways often cut across hierarchy and the 'normal way things are done around here'. However, building shared understanding is also a great context in which to grow as leaders and have meaningful impact in a domain that truly matters for business, people and the planet. The practices set out in this Playbook are called 'practices' deliberately; because they require ongoing and deliberate attention.

Here are **our tips** to help you set yourself and your organisation up for success:



For your organisation, it helps if:

- there is already some interest or commitment from leaders in your organisation to better understand and learn about the movement towards purpose-driven business
- you have a group of people you seek to influence and work with to build shared understanding. Note: there is no need to work across the whole business in one go; invest your efforts wisely
- you have reflected on the various frameworks and principles of purpose-driven business (set out in the next section 'About Purpose-driven Business'). This will be helpful as you work through some of the practices outlined in this Playbook.

For you as a leader / practitioner, it helps if you have:

- a personal interest or connection to the movement of purpose-driven business ('About Purpose-driven Business')
 a willingness to learn and grow personally and through
- a willingness to learn and grow personally and through experimentation
- an open and curious approach to people, systems and ways of working
- a willingness to be outside of your 'comfort zone' to seek progress not perfection
- → patience; this



What outcomes can I expect?

Intended value for your organisation

By paying attention to the insights and practices in this Playbook more consistently, your organisation could benefit from:

- a deeper held belief and understanding of the core principles anchoring a purpose-driven business / statement
- greater awareness about how your industry and business contributes positively to society, and what your stakeholders can expect
- enhanced awareness of, and connection to, the stakeholder relationships that need to be forged and nurtured to create this impact
- approaches to surface and navigate the inevitable tensions that arise as you consider wider and more diverse stakeholder interests
- a connected set of influencers across your business to support you in nudging the business towards purposedriven practice
- greater clarity on how purpose comes to life through dayto-day activities and decision making



Action

Watch the video of one of our community members sharing how the playbook has helped them build shared understanding.



Intended value for you, the practitioner

As a practitioner, attempting the practices in this playbook could give you:

- a deeper understanding of purpose-driven business
- a deeper understanding of the personal qualities and development required to lead purpose led business transformation
- a greater awareness of your own intentions, motivations, assumptions and beliefs about this work, yourself, your organisation and the world
- a deeper awareness of the interconnection between your mindset, behaviours and actions and their influence on others, your organisation and the world a growing network of influencers and changemakers in your business who are active in creating business as a force for good

Navigating the playbook

Building shared understanding

Stage 1: Introduction

In Stage 1, we invite you to explore what we mean by 'purpose-driven business'; why a shared understanding of this matters - and what practices we found deepen and sustain it over time.

Stage 2: Preparation

In Stage 2, there are two short diagnostic exercises intended to help you understand where you and your organisation currently are in relation to the community's 'Key findings' on building shared understanding.

Stage 3: Practice

The reflective exercises and tools that follow in Stage 3 are illustrative of approaches you could try to develop 1) the personal qualities and 2) organisational capability to deepen and sustain shared understanding

You are here

About purposedriven business

> **Key findings:** Building and sustaining shared understanding

Diagnose: Exploring the current state of play

> Developing personal qualities

Developing organisational practices for progress

Note: The practices in Stage 3 are by no means exhaustive. All contexts will be unique, so we invite you to experiment where there's eneray or uraency.





Stage 1: Introduction

About purpose- driven business

What is a purpose-driven business?

References to 'purpose' as an enduring reason for being have long been a part of management practice. Every business has a purpose that stakeholders experience in their interaction with it, regardless of what is espoused through their formal 'purpose statement'. If a business behaves in a way that suggests its sole intent is to maximise profits, stakeholders will experience and pick up on that.

In this Playbook, when we refer to a business being 'purpose-driven', we mean those that have chosen to anchor their purpose and 'reason for being' with an intent to protect and serve society's needs and interests. Some refer to this as 'sustainable' or 'social purpose' to make the distinction (see "Leading with a Sustainable Purpose" -Cambridge University).



The purpose of business is not to produce profits. The purpose of business is to produce profitable solutions to the problems of people and planet.

- Prof. Colin Mayer, Future of the Corporation

Further information on purpose-driven business:



Watch this video explaining the case and intent behind purposedriven business.

Click here to read the 'Inspiration' chapter of A Blueprint for Better Business's Knowledgebase.

Selecting your business's definition or framework

The good news is that purpose-driven business movement is growing, with several established definitions, frameworks and expert organisations to help practitioners get started and partner in transition. To prepare you for this work, you might want to explore these frameworks and choose one that most resonates with you and your organisation. This will be helpful as you start to experiment with some of the practices in Stage 3. Regardless of your choice of framework, these players are all in service of a common vision - to build a better world through better business. Some examples:

- A Blueprint for Better Business Framework & Principles of Purpose-Led Business
- BSI's PAS 808 Standard Purpose-Driven Organisations: Worldviews, Principles and Behaviours
- Forum for the Future Just & Regenerative Business

The Purpose-in-Practice Community did not seek to challenge these definitions and frameworks but acknowledges that selecting one as anchor is a necessary first step to building shared understanding and advocates a robust definition and serious intent. Your chosen definitional framework should be one that:

- directs business to be in service of people and planet
- challenges deeply held assumptions, beliefs and mental models about the role of business in society
- advocates for how business treats people and its relationship with the natural world



Findings:

Building a shared understanding of purpose-driven business

Why shared understanding matters

Building and sustaining shared understanding is a critical element of any purpose-driven business.

While commitment to purpose-led business is growing, scepticism of the intent of corporates to truly transform to profitably serve people and the planet is going nowhere. This uncertainty is driven by:

- the diversity of views around what 'purpose-driven' actually means in practice
- a perceived inauthenticity of some businesses
- increasing cases of 'purpose-washing'
- some business perceived to be u-turning in difficult contexts

Often, businesses committed to transitioning their ecosystems towards purpose are torn between:

- feeling a need to create or impose more clarity to preserve legitimacy of the movement
- the recognition that this change might necessitate a more nuanced, evolving approach and range of perspectives

Without a shared understanding of what it means to be purpose-led (at the level of assumptions and beliefs), problems persist and attempts to shift towards societal value remain difficult.

Community members also raised the following challenges:

- Sustaining momentum and interest beyond the initial 'launch'
- Making purpose personally and organisationally resonant
- Staying the course on purpose through leadership changes and challenging contexts
- Obtaining commitment and sufficient resource to tend to the work of cultivating purpose
- Influencing purpose-driven decision-making beyond formal committees

In light of this, The Purpose-in-Practice community set out to explore the following questions in their first 'Lab' – an iterative sensemaking and experimentation research process – titled "Building Shared Understanding":

The Purpose-in-Practice Community

1. How do you build shared understanding?

- What can we learn about what constitutes shared understanding?
- What can we learn about how to generate it?
- What seems to work and what doesn't in different contexts?

2. Who needs to build it?

- Who leads on this?
- What can we learn about those who take accountability for building a shared understanding?
- What do they need to know?

3. How do you sustain it?

- What can we learn about how to sustain a shared understanding of what it means to be purpose-led after initial enthusiasm fades?
- How does it survive, or get shaped by, difficult contexts?
- Does it need to sustain or can it change?



<u>How</u> businesses build shared understanding: Our findings

Together, the community identified six practices (illustrated alongside) that they believe affect an organisation's ability to develop and sustain shared understanding of purpose-driven business practice over time. Through the lab inquiry, practitioners found that companies that deliberately cultivate the conditions on the right, are better able to 'deepen and sustain' shared understanding of purpose over time. The conditions illustrated on the left – though useful to create the energy and mandate for purpose – are not sufficient to sustain it long-term. The group characterised this as a 'bang fizz' effect; where (if practices on the left persist), interest and engagement wanes after the initial launch or 'hype'.



Action

Watch <u>the video</u> of a community member shedding more light on how 'bang fizz' emerged and what it references.





In exploring the question 'who needs to build shared understanding', the community found that, although support from hierarchical power structures was important, it was not sufficient to sustain transformation. More critical is cultivating and connecting individuals (at all levels) with the qualities necessary to lead change from 'within'. Therefore, the most critical enabler to deepening and sustaining shared understanding can be found at the base (the 'foundation') of the visual – the 'qualities of the intervener' i.e. the person or people taking the lead on enacting these shifts. For the practices to be effective, it's important that the practitioner is also working on themselves and using a set of personal and relational practices to connect with others and enhance their potential impact. Some of these qualities are outlined in Stage 3 – 'Developing personal qualities'.

'Bang...fizz'

Practices for building shared understanding

'Deepen & sustain'

Focus on words

The purpose statement anchors the understanding

Ego

The leader, CEO, or business competitive advantage is driving meaning

Deferup

The power is held by the hierarchy to lead and drive action

Tell & sell

Tensions are ignored or suppressed as we convince or tell people harder

Expert-led

A passionate few take on the responsibility for having the 'right' answers

Great concept

Discussed and referenced, but disconnected from the day to day / core business



2 **Elevate the** enquiry

Widen vour lens

3

Lean into tensions

5 Connect catalysts



Co-create relevancy

Focus on intent

The principles, assumptions & beliefs of purpose-led business anchor the understanding

Eco

Societal need and industry relevance is driving the meaning - transcending competition or self-interest

Defer out (and within)

The power is shared and action is taken in dialogue with all stakeholders

Listen & learn

Divergent perspectives and tensions are surfaced openly to co-create breakthroughs together

Enable

We draw on networks distributed leaders / stakeholders to lead charge

Lived reality

Relevancy is co-created and enacted in day-to-day action

Critical foundation: Qualities of the 'intervener'

Navigating the playbook Building shared understanding

Stage 1: Introduction

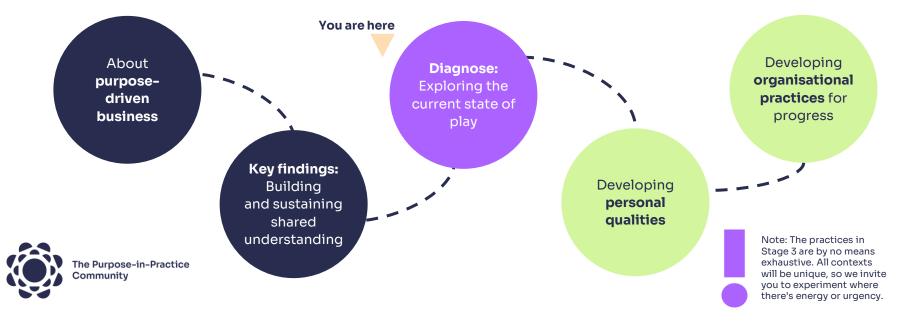
In Stage 1, we invite you to explore what we mean by 'purpose-driven business'; why a shared understanding of this matters – and what practices we found deepen and sustain it over time.

Stage 2: Preparation

In Stage 2, there are two short diagnostic exercises intended to help you understand where you and your organisation currently are in relation to the community's 'Key findings' on building shared understanding.

Stage 3: Practice

The reflective exercises and tools that follow in Stage 3 are illustrative of approaches you could try to develop 1) the personal qualities and 2) organisational capability to deepen and sustain shared understanding





Stage 2: Diagnose

Exploring the state of play

Stage 2: Where are you now?

As <u>outlined in Stage 1</u>, by exploring 'how' to develop and sustain shared understanding of purpose, the community surfaced a set of suggested organisational practices and personal qualities (for those leading this work) to develop. In some ways, the key job of leaders in purpose work is to intervene in ways that nudge their organisation to develop these desired capabilities. But the community also found that those who were most effective had a particular set of qualities / capabilities themselves. In effect, the chances of success of the work were directly related to how present the organisational qualities were in tandem with the relevant capabilities of the practitioners:

More favourable system conditions



Higher level of relevant personal qualities



Higher chances of success / impact

To help you understand your base-line for this work, we have created two diagnostic-style exercises. These will give you a sense of 1) where you are and 2) where your organisation might be against the qualities and capabilities <u>outlined previously</u>. We hope this will begin to highlight the nature of the journey you will go on to succeed.

1. System assessment: Organisational practices to cultivate

- What capabilities does your organisation more typically employ to build shared understanding?
- Where might be the most important or impactful place to start be in order to deepen and sustain understanding?

2. Self-assessment: Personal qualities to develop

- What personal qualities and capabilities do you have right now?
- What might you need to learn to deepen / develop greater capacity to build shared understanding with others?

1. System assessment: **Organisational practices** for shared understanding

Questions	Bang Fizz	My scores	Deepen & Sustain
A: What anchors understanding?	Focus on Words The purpose statement anchors the understanding	Most like me 1 2 3 4 5	Focus on Intent The principles, assumptions & beliefs of purpose-led business anchor the understanding
B: Where is the understanding centred?	Ego The leader/CEO/business competitive advantage is driving meaning	1 2 3 4 5	Eco The principles, assumptions & beliefs of purpose-led business anchor the understanding
C: Where do you default for action?	Defer up The power is held by the hierarchy to lead and drive action	1 2 3 4 5	Defer out (and within) The power is shared and action us taken in dialogue with all stakeholders
D: Whose perspective matters?	Tell and Sell Tensions are ignored or suppressed as we convince or tell people harder	1 2 3 4 5	Listen and Learn Divergent perspectives and tensions are surfaced openly to co-create breakthroughs together
E: Who leads the charge?	Expert led A passionate few take on the responsibility for having the 'right' answers	1 2 3 4 5	Enable We draw on networks distributed leaders / stakeholders to lead change
F: How is it experienced?	Great concept Discussed and referenced, but disconnected from the day to day / core business	1 2 3 4 5	Lived reality Relevancy is co-created and enact <mark>ed in</mark> day-to-day action

Instructions

On a piece of paper, note down your responses to questions A-F in the lefthand column.

Write down a score of 1-5 for each question to reflect where you think your organisation is today (most of the time). Be honest! You don't need to share this with anyone. You will find some scoring quidance on the next page.

If possible, invite others to complete the exercise (keeping responses individual). Capture those too (see capture table on page 23).



Watch this video of a community member explaining their experience of completing this exercise. 21

1. System / Organisational assessment: **Scoring Guidelines**

A. What anchors the understanding:

l = We have a purpose statement. Many can recite it – and some cannot. Most cannot explain why and how we create value for people and planet as a business.

5 = Everyone understands the intent, underlying beliefs and assumptions about how our organisation creates value for its stakeholders and society, beyond reciting the purpose statement.

B. Where is the understanding centred?

1 = The understanding and narrative around purpose is being driven from the top or by the market / peers / shareholders.

5 = All our people understand the value of our industry / sector to society, as well as the expectations of stakeholders.

C. Where do you default for action?

l = When times are tough, we default to a charismatic leader or CEO / senior leaders to make decisions. People are passive consumers, deferring to leadership for answers.

5 = When times are tough, we explore the needs and impacts with and alongside our stakeholders, making them active participants in the ultimate decisions we take.

D. Whose perspective matters?

I = We are selling the idea of being a purpose-led company by those tasked with 'rolling it out' - trying to convince people. There is little or no room for discussion or scepticism. Though we say we take challenges on board, we don't meaningfully question it – we might even suppress it

5 = We constantly invite and explore different perspectives, inviting healthy debate and robust dialogue, even when it is uncomfortable and takes time. We know this cultivates greater understanding and commitment, particularly when we have difficult decisions to make. There is seldom bland uniformity.

E. Who leads the charge?

I = We look to our leaders to make decisions about what matters and we follow them. Decisions are made by a small group of experts and we let them get on with the job. The people who care about this and have the intrinsic motivation to make a difference don't know each other and our business does nothing to bring us together.

5 = We have identified and networked people with the care and qualities to create change with each other in communities of practice and they are supported by leaders to come together. They are empowered to lead, experiment and take action in service of purpose.

F. How is it experienced?

1 = We reference 'purpose' a lot – especially senior leaders who seem to 'get it'. But many don't understand how it applies to them or their jobs. No one at senior levels seems committed to sourcing the human and other resources required for the journey and it's always an easily-dropped afterthought within our communication events.

5 = Our purpose (or absence of it) is evident in our products, proposition and priorities. People understand why their work is meaningful. The infrastructure and investment for change to the business / model is in place and secure. Its significance doesn't come under pressure when other priorities emerge. In fact, we find ourselves using our purpose to guide our choices.

1. Organisational assessment:

Interpreting your results

Instructions cont...

Explore the range of scores and invite each person to share their rationale. Ask: What are some people seeing that others are not?

Insights about the differences might give you some indication of where there are 'bright spots' that you could build on – or the blind spots to address in your attempts to build shared understanding.

Taking the average score, use this to:

- prioritise which of the six practices for 'building shared understanding' you most need to focus on. The lower scoring ones might be a way of prioritising where to start.
- For example, if you are closer to '1 or 2' on question 'C', then you may want to focus on building the 'Widen your lens' practice.
- create a baseline measure that you can come back to later – after doing some of the work on building shared understanding in this Playbook

Navigate to Stage 3: <u>Developing organisational practices for progress</u> to find the practice you want to experiment with

Scoring Template

	Our Scores	Total / Average	Practices for cultivating shared understanding	Conditions to deepen & sustain
A. What anchors understanding?			1 Anchor to intent	Focus on Intent The principles, assumptions & beliefs of purpose-led business anchor the understanding
B. Where is the understanding centred?			2 Elevate the enquiry	Ego Societal need and industry relevance is driving the meaning – transcending competition or self- interest
C. Where do you default for action?			3 Widen your lens	Defer out (and within) The power is shared and action us taken in dialogue with all stakeholders
D. Whose perspective matters?			4 Lean into tensions	Listen and Learn Divergent perspectives and tensions are surfaced openly to co-create breakthroughs together
E. Who leads the charge?			5 Connect catalysts	Enable We draw on networks distributed leaders / stakeholders (with critical qualities) to lead change
F. How is it experienced?			6 Co-create relevancy	Lived reality Relevancy is co-created and enacted in day to day trial and error



Top tips

The six practice exercises <u>outlined in Stage 3 of the Playbook</u> do work sequentially, but you also need not complete them in order. We highly recommend completing Practice 1 ('Anchor to intent') as this ensures that you, and the group you are working with, understands the principles of a driven business. We also suggest that you complete the Personal Qualities diagnostic on the next page before leaping to action, identifying personal areas of development for you to work on as you experiment with these practices.

2. Self-assessment:

Personal qualities to develop

Working with purpose often does not reflect the common ways we are typically encouraged to develop in our careers. Instead, it requires us to consider the whole systems around us and our organisations, and to work with a level of complexity. This requires us to develop personal qualities that may seem different to those we have already finely tuned.

Our research has revealed a series of inner conditions or personal qualities that will aid practitioners who are seeking to sustain shared understanding.

The qualities you grow will encourage you to meet people and your organisation where they are, navigate complexity together and work alongside them to nudge forward.



- Bill O'Brien

Critical foundation:
Qualities of the 'intervener'

2. Self-assessment: Personal qualities to develop

Questions	Most lil me	My scores	Mc	ost like me
A. How are you motivated at work?	By doing a great job, performing well and hitting all my objectives and targets.	1 2 3 4	5	Through the long-term positive impact of my organisation, regardless of the job to be done.
B. How varied are the perspectives and views you seek and hold?	Prefer to work with those who share my perspectives and opinions. Seek consensus.	1 2 3 4	5	Value and actively seek out new and different perspectives. Embrace group tensions around difference.
C. How do you respond to uncertainty and discomfort?	Prefer to have and understand all facts and perspectives before taking action.	1 2 3 4	5	Prefer to step into uncertainty and trust the process to allow the route to success to unfold.
D. How do setbacks impact you?	Setbacks are mistakes in my own performance if I don't 'get it right'.	1 2 3 4	5	I learn and improve through setbacks and gain knowledge about myself and my organisation.
E. How do you take risks and make decisions?	Prefer to check ideas/direction with seniors before acting. Seeks permission for the way forward.	1 2 3 4	5	Willing to try and experiment with untested concepts and ideas. Seek forgiveness when things don't go to plan.
F. How do you encourage and mobilise others?	Ensure everyone understand their place, role and tasks within a hierarchy of people.	1 2 3 4	5	Role model working through a network of people, empowering and mobilising others using coaching and facilitation techniques.

Instructions:

Get a piece of paper and a pen to note down your responses (See questions A- F on the diagnostic)

Write down a score of 1–5 for each question to reflect your personal preferences (how you show up most of the time). Be honest! You don't need to share this with anyone.

If possible, get others close to you to share their perspectives to inform your responses.

Remember - both sets of qualities are equally valid and useful in different situations.

Self-assessment: Interpreting the results

Instructions cont...

Take a look at your scores. If your scores were closer to 1, you will benefit from heading to <u>Stage 3: Personal Qualities</u> to explore 'tips to cultivate these qualities'. If most were closer to 5, you may find this work more of a natural fit, yet still find corporate culture difficult. Think about a colleague or partner who could benefit from working alongside you as their mentor.

Scoring Template

Quality / Question	Your score	How others see you	For each Factor, the most helpful qualities for building shared understanding are scores closer to 5.
A. How are you motivated at work?			Intrinsic motivation: Being intrinsically motivated by the long-term positive impact of business in society; regardless of the job to be done.
B. How varied are the perspectives and views you seek and hold?			Value Difference: Valuing and actively seeking out new and different perspectives. Embracing group tensions around difference.
C. How do you respond to uncertainty and discomfort?			Lean into fear and uncertainty: Embracing fear and uncertainty as a great teacher. Acknowledging discomfort as a path to personal growth.
D. How do setbacks impact you?			Learn from failure: Focussing on progress and learning versus mission accomplished. Viewing setbacks as part of the road to success.
E. How do you take risks and make decisions?			Embrace Emergence: Holding the longer-term vision of what could be. Recognising that the true future emerges in a non-linear way – through trial, error and learning.
F. How do you encourage and mobilise others?			Let go of individual control: Working through a network of people, empowering and mobilising others using coaching and facilitation techniques.



Personal Qualities

- Connect to intrinsic motivation
- Value difference
- **Lean into fear**
- Learn from failure
- Embrace emergence
- Let go of individual control

Stage 2: Taking action (post diagnosis)

Having completed the organisational and personal assessments, you will have identified priority organisational and personal practices to work on. Irrespective of what you found, we still recommend that you read through all the practices in <u>Stage 3</u> to test which might feel most relevant for your business / context.

As you read through each section ask yourself:

- Personal practices:
 - Where do you sense the greatest return for your effort might come from? Which practices excite you?
- Organisational practices:
 - What do you sense your organisation needs most? What is it ready for? What might an easy first application of each practice be and which one seems the best fit?

Start with the most relevant organisational practice for your organisation and identify a personal quality (or two) that complement it and begin with both.

There isn't a 1:1 relationship between the personal and organisational practices, nor any kind of sequence for developing them. All of the personal qualities will help make you more effective in delivering all the suggested organisational practices. If done well, they will accelerate what psychologists call 'vertical human development', expanding your capacity to work with complexity in all situations.

Personal Qualities Connect to intrinsic motivation Anchor to intent Elevate the enquiry Widen your lens Lean into fear Lean into tensions Embrace emergence Co-create relevancy Let go of individual

Whilst the organisational practices don't have to be done in sequence and some may not be relevant based on how much work has already been done in your organisation, they also do work well in the order presented.

control



Navigating the playbook

Building shared understanding

Stage 1: Introduction

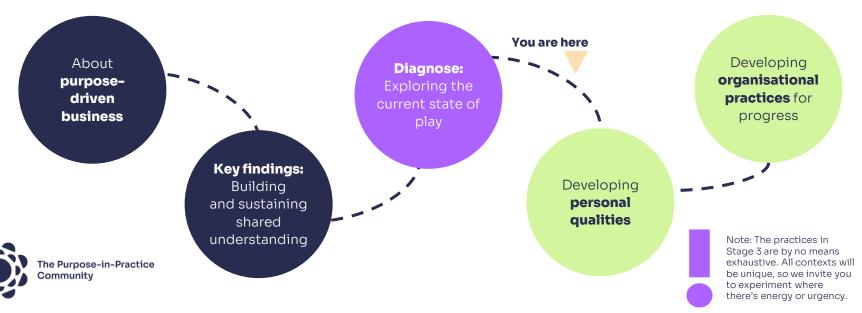
In Stage 1, we invite you to explore what we mean by 'purpose-driven business'; why a shared understanding of this matters – and what practices we found deepen and sustain it over time.

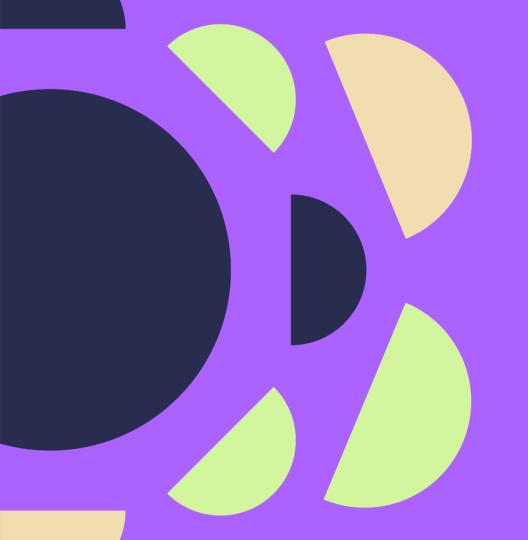
Stage 2: Preparation

In Stage 2, there are two short diagnostic exercises intended to help you understand where you and your organisation currently are in relation to the community's 'Key findings' on building shared understanding.

Stage 3: Practice

The reflective exercises and tools that follow in Stage 3 are illustrative of approaches you could try to develop 1) the personal qualities and 2) organisational capability to deepen and sustain shared understanding





Stage 3: Practice

Developing personal qualities

Your personal development: Introduction

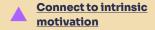
In this section, we outline a series of personal qualities that we believe support leaders seeking to build shared understanding of purpose-driven business.

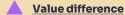
The Purpose-in Practice Community's experience suggests that 'how' we show up as practitioners doing this work has a big impact on the chances of success. Personal qualities seem to have as much influence as task competence and building shared understanding is driven by dialogue and relationships. It's therefore important that the person leading this work is also working on themselves - and using a set of personal and relational practices to enhance their potential impact.

When we're at our best, how we behave acts as a 'model' for others and enables them to lean into new conversations and ways of thinking. How we choose to behave is strongly influenced by the things we believe; the assumptions we hold as well as our values. So, as you engage in this work, we encourage you to delve deeper into your own assumptions, beliefs and values. This is the primary objective of this section of the playbook; to outline a set of practices to help you do this and ultimately increase your impact.

There is a lot written about the idea that the "success of an intervention depends on the interior condition of the intervener". If you want to learn more, we suggest you explore theories of adult ego development from Bill Torbert and Robert Kegan. The personal qualities questionnaire helps you to better understand areas where you may want to grow.

Personal Qualities





Lean into fear and uncertainty

Learn from failure

Embrace emergence

Let go of individual control



The success of an intervention depends on the inner condition of the intervener.

- Bill O'Brien

Critical foundation:
Qualities of the 'intervener'

Developing personal qualities:

Reflection questions to hold when interacting with others

The questions outlined below are designed to help you reflect on how well you are role modelling the personal qualities the community found most useful in developing shared understanding. You may wish to refer to these before, during or after interacting with individuals or groups you are seeking to influence. Irrespective of whether you dive deeper into each personal quality practice in the coming pages, consistently reflecting on these questions will help deepen your practice.

Personal Qualities

Connect to intrinsic motivation Learn from failure What would success look like for me personally? What can this setback teach me and others for the future? Who or what are the intended beneficiaries of my efforts? How can I celebrate this so that I give permission for others to What are my assumptions and beliefs about the motivations of do the same? the people I am with? Who else might value the learning from this? How might I be wrong? What do I need now to recover / re-resource myself? Value difference **Embrace emergence** How can I be more curious, less critical ('right' or 'wrong' What is the shared vision of the future I'm trying to nudge internal judgements)? towards here? Am I being more 'gatherer' (of data and opinions) or 'gate-• What patterns of behaviour do I notice? Both helpful and keeper' (of 'right' or 'wrong')? unhelpful)? • What other perspectives could I bring to this? (as a customer, How might I intervene in new ways to learn more about what parent, community member?) changes the patterns? Lean into fear and uncertainty Let go of individual control Who or what is triggering this? What ideas / perspectives am I 'attached' to? Are those Where do I notice my fear (thoughts, feelings, body commitments serving the whole or would it help to loosen sensations)? them up a bit? If I pause and take a breath before reacting, what do I notice? How can I create the conditions for others to lead – even if it's What is it really trying to tell me? not the way I would do it?

How can I celebrate / champion others' insights and actions?

1. Connecting to intrinsic motivation:

Exploring intent

About this quality

This is about connecting you with what gives you and others greater meaning and purpose at work.

Why this quality matters

Our intention becomes our attention, which becomes our behaviour and our action. It's also where we get our energy from. In building shared understanding of purpose, it's critical to uncover what intrinsically motivates you and others about this work while honouring differences. Your goal is not to impose change on others, but rather unlock it.

Helpful ways to think about this

- Intrinsic motivation comes from within and is driven by enjoyment.
- The intrinsic motivation to perform well at work comes from within rather than a desire to gain an external reward or recognition.
- When we are mainly motivated by our own status, hierarchy, power or money, we tend to make choices and decisions at work that maximise those things.
- When we connect with purpose in a way that brings us inner joy, our performance aligns with the fulfilment of that purpose, and our intentions and actions become focused on that.

Tips and tricks for cultivating this quality

Working on the 'inner' you

- Complete the 'Inspiration' and 'Assumptions and beliefs' sections
 of A Blueprint for Better Business's Knowledgebase. Reflect on
 how the values of purpose-driven business and your own
 assumptions and beliefs align with this work.
- Reflect on the purpose, products or services of your organisation.
 Ask whether they align with what you find important in life and / or if they could evolve to do so. You will need to believe this to do this work.
- Define which values of your organisation are aligned with yours. Focus on them in your work.

Working on you in your organisational context

- Belonging is an important quality to feel intrinsically motivated. Note down the different communities you belong to at work and how you experience that belonging. How might you make others feel like they belong?
- Seek out and grow your network to include the people who inspire you in how they embody and live purpose in your organisation (and beyond).
- Note down in which ways, and by who, you feel valued and seen in your organisation. Explore how you might make others feel valued / seen in this work.





Journaling exercise

Reflect on your own intentions in doing this work:

- What would success look like for you personally?
- Who or what are the likely beneficiaries of your deepest intentions? Is it you? Your team? Organisation? Society? The Planet?
- How will your intentions show up and influence a) the connections you make? b) the ways of working and projects you influence? and c) the impact your organisation creates?

Purpose through actions, not words

- How does the purpose of your organisation consciously play a role in influencing your ways of working, the decisions you make and the things you pay attention to?
- What are your assumptions and beliefs about the motivations of the people you are influencing?
- How might you be wrong?
- What other perspectives could you consider? Convening a small, diverse group of early supporters for this work to explore questions like these could help.

2. Value difference: Holding our own perspective lightly

About this quality

This is about helping you value (and actively seek out) new and different perspectives.

Why this quality matters

Building authentic shared understanding requires meeting people where they are – and embracing the inevitable tensions that arise from difference. This isn't possible when we're too attached to our own perspective and not comfortable with conflict. Deep listening helps to identify where the common ground might be in building shared understanding.

Helpful ways to think about this

- Hearing affirming perspectives makes us feel good. Hearing
 different or conflicting perspectives can make us feel
 uncomfortable or triggered. The risk is that we surround
 ourselves with people 'like us' who believe in the purpose-led
 business movement whilst avoiding the tougher
 conversations where real change and adoption needs to
 happen.
- If we want belief and motivation for purpose-driven business to be authentic in our organisations, we cannot be selective about who and where we build bridges.
- Being OK with discomfort is key to deeper listening and understanding. Discomfort can often present itself with judgement-based thoughts of why something isn't 'right' or 'won't work'.
- Noticing how you feel when you hear a new perspective is key to being able to accept different perspectives.

Tips and tricks for cultivating this quality

Working on the 'inner' you

- When you notice 'right' or 'wrong' internal judgements, try to change it to a curiosity. For example, switch
 'it won't work' to 'how could this be?'
- Become familiar with how you react when you feel uncomfortable (your habitual reaction signature). Pay
 attention to where your body tenses, how thoughts play out and the emotions you experience. When you
 become familiar with this you can notice when it arises, and choose how to respond, rather than habitually
 reacting.
- Don't 'listen to win' (in other words, thinking through your response whilst someone else is talking). Be
 really present to their ideas. Acknowledge any assumptions you might hold about them at the start of any
 conversation and park them whilst you engage in conversation.
- Pause and pay attention when you risk being triggered into a 'reactive'. If you find yourself 'triggered' in an
 interaction, take a pause and try to first name it (the trigger), the emotion (e.g. anger), then ask a
 clarification question to delay any reactive response. Turn thoughts related to judgements into curious
 questions.

Working on you in your organisational context

- In meetings, view your role as a gatherer (of data and opinions,) not as the gate-keeper of what is 'right' or 'wrong'.
- Notice when you convene groups of 'people like you'. Consciously invite people who may hold alternative
 views or perspectives. Actively seek and stay connected to perspectives beyond your organisation
 boundaries.
- Become familiar with how you habitually react in meetings when you experience discomfort. Do you shut
 down others, change the subject, shrink in your seat, go quiet? Become familiar with your habitual pattern
 and choose how to change it
- Be curious about others' perspectives beyond what is being said / observed
- Embody other stakeholders (imagine yourself as a customer, parent, teenager, investor etc), and encourage others to do so, to share provocative/controversial points.

In workshop/ group settings:

- Start with agreements around confidentiality and use processes that invite divergence without judgement at the start.
- Invite anonymous contributors through platforms such as chat/Slido/Menti to give more voice to controversial views.
- Allow all voices to be equal in the room (i.e. use 'rounds' where each person is given a set time to share their
 perspective before opening up a conversation. Invite the most powerful person in the room to speak last
 etc.)
- Acknowledge what is going on for you as a practitioner. This gives tacit permission for others to do the same.
- Don't move to closure on issues too quickly. If possible, find ways to facilitate the groups you work with to
 draw their own conclusions and do the work of making meaning rather than you doing it for them.

3. Lean into fear and uncertainty:

Grow personal agency

About this quality

This is about maintaining personal agency and power when experiencing fear or uncertainty.

Why this quality matters

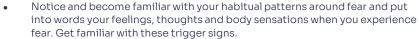
The path to purpose is an unpaved and complex one. Leaning into fear and uncertainty will be critical to building belief in the movement and helping others do the same.

Helpful ways to think about this

- Purpose-driven change is complex, systemic and ambiguous.
 There is no silver bullet solution to making change happen. This invariably takes us into unknown territory. The inevitable uncertainty and ambiguity triggers a natural threat response.
- Fear paralyses us, limits us and stops us achieving and being our best selves. Experiencing fear is our body and brain's way of trying to keep us safe from danger, but it is sometimes misguided and unhelpful at work.
- When fear shows up in us, we can either get ready to go into attack mode, avoid and hide (which may look like not contributing or engaging) or run away (disengage completely from the work). Unless we are in serious danger, these reactions can be unhelpful.
- The 'fight', 'flight' or 'freeze' are well documented reactions in us when we face fear. We try to get away from the situation or person that is making us fearful.
- A fourth fear response that may be more helpful for us in work settings is 'tend and befriend'. This wasn't discovered by the scientific community until the 2000s, and involves connecting with others facing the fear, together.

Tips and tricks for cultivating this quality

Working on the 'inner' you





- Where do I notice my fear (thoughts, feelings, body sensations)
- What is it trying to tell me?
- What is my first, small step to overcome it?
- Who will support / believe in me?
- Regularly take part in and create habits and practices that relax the body (exercise, meditation, being in nature, play). A relaxed body can relax the mind and our emotional response.

Working on you in your organisational context

- Identify the people or situations at work that you might be afraid of. Invest time in finding out more about them personally / their intent.
- Fear can be overwhelming and all-encompassing, so break down exactly what
 it is triggering fear in you into smaller, bite sized chunks. Getting specific
 about even just naming fears can help dissipate them. Tackle each one at a
 time.
- Share your fears and create safe places/meetings where others can too. Identify the people who believe in you and give you support and encouragement to lean into your fear. Go hang out with them more.
- Identify other people and teams who overcome similar obstacles to you and find out how did they approach them? Go learn from them.



4. Learn from failure: Build resilience

About this quality

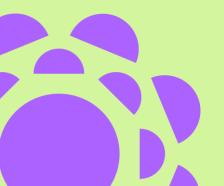
This is about how you respond to, and bounce back from, setbacks.

Why this quality matters

This work is non-linear, ebbing and flowing over time alongside differing priorities for the organisation and people. It is a long road to sustain and growing resilience is key to enabling that.

Helpful ways to think about this

- Working with purpose is the longest-term goal your organisation has and it is unlikely it will ever be achieved (e.g. ending world poverty). Rather, it is in the process of trying to achieve it, that the real progress comes.
- Long-term goals are more akin to running marathons than sprints, and require us to spend more time looking after ourselves in developing our own stamina and resilience.
- Setbacks and failures will be common and how you respond to them will impact your stamina and resilience.



Tips and tricks for cultivating this quality

Working on the 'inner' you

- Be curious about how setbacks and mistakes impact you. What do you notice about your thoughts, feelings and body sensations?
- How do you typically react and behave following setbacks and failures?
 They can come through in our tone, facial expressions and body language.
 How you react will be a signal for others about what is acceptable and not acceptable behaviour.
- Setbacks and mistakes can negatively trigger our nervous system. Create habits to look after your physical and mental wellbeing. The NHS suggest the following 'Five Ways to Wellbeing':
- 1. Connect with other people.
 - 2. Be physically active.
 - 3. Learn new skills.
 - 4. Give to others.
 - 5. Pay attention to the present moment (mindfulness).

Working on you in your organisational context

- View and use setbacks and failures as learning opportunities. Make public what has happened, been learnt and how the course of direction or the process to get there has amended or morphed as a result.
- Reflect on how failures are treated in your organisation. Get curious about how this drives your (and others') behaviour.
- Publicly celebrate all developments the successes as well as the learnings to make mistakes more normal.
- Engage in reflective practice at the end of meetings to encourage a regular and more natural dialogue on what works / doesn't work. e.g. at the end of each meeting, briefly consider:
 - 1. Were the objectives of the meeting met?
 - 2. Did the content and style of meeting help or hinder?
 - 3. Did everyone who wanted to contribute do so?

5. Embrace Emergence: Let the future evolve



Watch one of our community members talking about their experience of this.



About this quality

This is about how to meet the reality of a complex environment where change doesn't happen in a predictable way.

Why this quality matters

Purpose comes alive through belief in a better future — and a way of working or 'being' – rather than a prescribed strategic plan with fixed and quantitative measurements.

Helpful ways to think about this

- Anchoring to a purpose that promises to contribute positively to stakeholders and society, also invites in complex and systemic challenges that cannot be 'solved' for in linear ways.
 Needs and context are always shifting – as are stakeholders' expectations of a desired future.
- Like any great long-term and complex missions, being able to create a vision that satisfies all parties - or trying to predict the future with certainty - is extremely unlikely. Purpose can act as both a guiding light - and daily guide - to navigating the complex and unpredictable, together.
- Instead of trying to control and predict the unpredictable, we
 can instead 1) embrace experimentation as a helpful structure
 to learn our way into a more purpose-driven future and 2)
 control how we respond to change. Instead of trying to have all
 the answers, we should instead focus our energy on asking the
 right questions. The ones that reveal our next best course of
 action.

Tips and tricks for cultivating this quality

Working on the 'inner' you

- Continuously connect to your intent and the principles of purpose. These act as great anchors when desired outcomes / futures don't emerge as planned.
- Become a keen observer of others and of your own reactions to what's happening. Notice when you are triggered or take something personally and be curious about it if the push back is a systemic response to what you are doing, what can you learn about your system?
- Take time to reflect on your 'inner game' what insights can you glean from taking time out to reflect on what happened that set you up for the future.

Working on you in your organisational context

- Work with and alongside people to co-create a north star / longer term vision of a
 positive future
- Help others work emergently by making it 'ok' not to have certainty about what will
 happen when you do things in a complex environment
- Enable others to think less about plans and set pathways and be curious about emerging patterns. Experiment with untested concepts and ideas in service of that. Seek forgiveness if things don't move you forward towards your goal.
- Be present look for patterns of behaviour what do you notice is happening? Help others to do the same. Model curiosity about what might be true that would explain patterns of behaviour rather than judge things as good or bad
- Keep an eye on the purpose in all decisions and actions. If it had a seat at the table of a
 meeting what would it say?
- Keep abreast of developments inside and outside your organisation that may impact
 or influence the purpose, and call these out.
- Trust the process and let the route to success unfold through exploration, curiosity and experimentation.

6. Let go of individual control: Mobilise others

About this quality

This is about how to enable and mobilise others for a more authentic adoption of purpose.

Why this quality matters

Building shared understanding requires everyone to have a level of connection to the purpose of the organisation. This only comes alive when it is catalysed from within them, rather than something they are conditioned or told to do.

Helpful ways to think about this

- "If you want to go fast, go alone, if you want to go far, go together" African proverb.
- True adoption of purpose requires trusting the process and trusting others, relinquishing the need for things to be done 'our way'.
- The need to control can sometimes be driven by a need for things to be perfect. This is common in our working lives when expertise is highly valued and rewarded.
- But how people 'make sense' of purpose personally and in their work – is a subjective phenomenon.
- Creating space for others to explore, experiment and find their own meaning is where we need to place our energy.
 This encourages ownership and builds the autonomy in others to act authentically.
- Our focus must be on how we are facilitating a process in others – rather than achieving a fixed outcome or objective.



Action

Watch one of our community members talking about their experience of practising this quality.

Tips and tricks for cultivating this quality

Working on the 'inner' you

- Notice how motivated you are being a knowledgeable 'expert' vs an enabler and facilitator of others.
- View your role as key to growing a movement, rather than the successful outcome / delivery of a project.
- Work on 'being OK' with the fact that this work will always be much bigger and wider than your competence and capability.
- View your role as an 'enabler of others' rather than a gatekeeper for this work. Accept you will not be able to control how it develops and grows.

Working on you in your organisational context

- Practice defining and agreeing overall intentions with others, and then allowing them the autonomy to work out how to bring them to life. Notice how it feels for you and for them.
- Ask yourself how it might be possible to be less prescriptive about specific outcomes or measurements and what happens when you allow these to emerge.
- Prior to attending important meetings / interactions, note down your assumptions, beliefs and perspectives on the group and / or the individuals, and how this may impact your perceptions, thoughts, feelings and need to control.
- Use more coaching and facilitation skills in your interactions.
- Ask more open, coaching questions i.e. questions that support growth, clarity and understanding in others. Try reframing more questions to begin with 'how' rather than 'what' or 'why'.
- Specifically, look to facilitate the conditions for psychological safety that allow others to step forward and explore their role in connecting to the purpose.
- Become familiar with facilitation skills (see tips and tricks under 'Value Difference').

Navigating the playbook Building shared understanding

Stage 1: Introduction

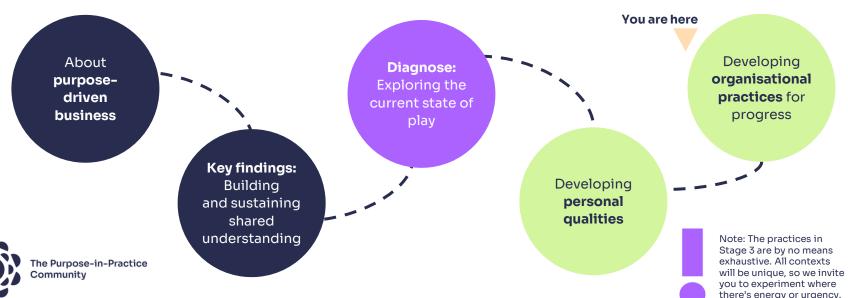
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In Stage 2, there are two short diagnostic exercises intended to help you understand where you and your organisation currently are in relation to the community's 'Key findings' on building shared understanding.

Stage 3: Practice

The reflective exercises and tools that follow in Stage 3 are illustrative of approaches you could try to develop 1) the personal qualities and 2) organisational capability to deepen and sustain shared understanding





Stage 3: Practice

Developing organisational practices for progress

Organisational practices for cultivating shared understanding:

What you can find in this section

The exercises and tools that follow are illustrative of approaches you could try to develop the organisational capability to **deepen and sustain** shared understanding.



Practices for building Suggested 'Deepen & sustain' **Approaches** shared understanding Focus on intent Exercise 1: Deepening advocacy Acknowledge The principles, assumptions & beliefs of purpose-led and understanding through the anchor business anchor the understanding dialogue and sense-making **Exercise 2:** Visioning your Eco Elevate the Societal need and industry relevance is driving the purpose-driven industry/sector enquiry meaning - transcending competition or self-interest ์ ฮ ` Exercise 3: Exploring dilemmas Deferout (and within) Widen with a citizen mindset The power is shared and action is taken vour lense in dialogue with all stakeholders **Exercise 4:** Perspective shifting / Listen & learn Lean into Divergent perspectives and tensions are surfaced Voices from the field openly to co-create breakthroughs together tensions 5 Enable **Exercise 5:** Network mapping / We draw on networks distributed leaders / Connect Community building stakeholders to lead charge catalysts 6 **Exercise 6:** Translating principles Lived reality Co-create into practice: Experimentation Relevancy is co-created and enacted relevancy in day-to-day action

Note: The practices in this section are by no means exhaustive. All contexts will be unique, so we invite you to experiment where there's energy or urgency.

Practice 1: Anchor to intent

Deepening advocacy and understanding through dialogue and sense-making

Develop from

Focus on words

The purpose statement anchors the understanding



Towards

Focus on intent

The principles, assumptions & beliefs of purpose-led business anchor the understanding

About this practice

This practice invites groups to question the root assumptions and beliefs that underpin purpose-driven business, using dialogue and collective sense-making as a vehicle for doing so. Why? Because, for purpose-driven business to be authentically realised, it cannot be enforced on people or an organisation. People must be convinced for themselves that becoming purpose-led can create a better business that is also better for society. This goes far beyond the words used to express a purpose statement. It must go deeper.



Action

Watch the video of one of the community architects talking about the importance of this practice in their work



Why this practice matters

Being purpose-driven not only involves substantial shifts in strategy and culture, but fundamentally it shifts the beliefs and assumptions that underpin how an organisation creates value for all its stakeholders and society.

In short, this is not a task nor a one-time communication challenge; it's about building a value-system (a new way of being). For action to be authentic and sustained, the work must be meaningful. How we make meaning is personal and a process – one that happens in relationship to past and current experience, and to others / our environment. That's why we must allow time and space for people to share different perspectives, speak openly, and raise questions and dilemmas together about what the principles mean to them. The goal is not bland uniformity of responses, nor the ability to recite the purpose statement. Rather, it is to build a deep personal commitment to upholding the principles, assumptions and beliefs of purpose-driven business. This comes from having invested time in healthy and robust ongoing dialogue and debate with others. Workshops and team meetings are a great format for this.

Practice 1: Anchor to intent

Example exercise

This 60-90min session can be run in person or virtually.

What you will need

- A set of purpose-led principles or practices that you feel comfortable to speak to (<u>See Stage 1 - 'About Purpose-driven</u> <u>Business'</u>) – though a video has been provided.
- A group to work with, ideally no fewer than four people. There is technically no maximum, as long as you can break into groups that allow for meaningful dialogue.
- To read '<u>Tips for facilitating quality dialogue</u>', ensuring you learn and can role model the practice.
- To read the 'Shared Understanding' section of the Blueprint for Better Business Knowledgebase (exploring your own beliefs and assumptions). Remember to select and practise one or two of the personal qualities as you do this exercise.

What to bear in mind

- Let things emerge.
- Be curious not critical. Being 'right' creates resistance and misses an opportunity to better understand the intent behind what an individual is contributing. Curiosity is where bridges are better built from.



Objectives

- Deepen the understanding of what 'purpose-led' means beyond a statement of intent.
- Explore what appetite there is to become 'purpose-led', and what people think the barriers are.
- Create space for a spectrum of views to be heard, both on the unrealised potential and opportunities, and for people to raise what they think the barriers are.
- Lift people out of the day-to-day, raising the ambition of what their collective intelligence, influence and experience could be in service of.

Desired outcomes:

- Belief and buy-in to purpose-driven business principles (beyond words alone).
- Appreciation for the intent and different aspects of purposerelated change.
- Motivation and drive to challenge and evolve personal and business practice in service of better societal and business outcomes.

Example Workshop Outline (60mins)

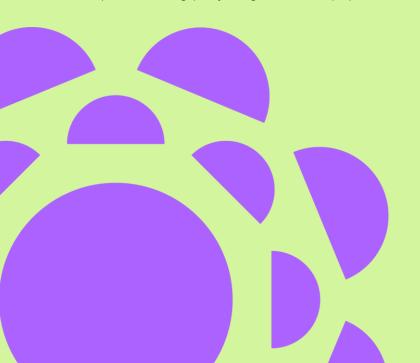
Time	Activity	Lead	Format	Materials
5mins	Welcome & Context Share objectives (above) and agenda Set ground rules for good dialogue: No interrupting Listen fully, not to respond Welcome diverging perspectives There are no 'wrong' answers	You or leader host	Plenary	N/A
10mins	Check in: 1. What are you feeling? (one word) 2. Any distractions? 3. What does 'purpose-led' mean to you, now?	All	Small groups: Go round the 'room' Large groups: Move to breakout	Slide: 3 questions on screen
5mins	Present an introduction to purpose-led business ■ Walk the group through the principles of a purpose-driven business (Click here for A Blueprint for Better Business or click here to play the video)	You (or <u>Share the</u> <u>video</u>)	Plenary	Slide: Purpose-driven business principles
10mins	ROUND 1: Reflections / Reactions Remind the group of the ground rules for good dialogue (above) Pose the provocation questions below and invite anyone to contribute (at random). Gather as many uninterrupted contributions as possible What resonates with you? What surprises or jars with you? What questions are you left holding?	All	Small groups: Allow	Slide: 3 questions on screen
15mins	ROUND 2: Deepening awareness Pose the questions below and invite group to contribute (at random – inviting people to raise their hands and share) - Where do you see our business / industry exemplifying these principles? - Where aren't we? Why is that? - How does our purpose statement represent these principles?	All	random contributions. Draw out quieter voices Large groups: Move to breakout	Slide: 3 questions on screen
10mins	ROUND 3: Making meaning Pose the questions below and invite group to contribute (go around the group, each person answers in turn) - How might these principles change how I think, act and make decisions every day? - What would it take to make that true about my every day?	All		Slide: 2 questions on screen
5mins	Check out: What are you feeling, now? (one word) What does 'purpose-driven' mean to you, now?	All		Slide: 2 questions on screen



Practice 1: Anchor to intent

Further workshop ideas

The workshop on the previous page is just an example – feel free to amend the design to suit your audience. Below, we provide links to further workshop designs for you to draw inspiration from and experiment with based on your context or specific objective. Remember, what is most important for developing shared understanding is how you facilitate the dialogue in the group – encouraging debate and diversity of views. Read <u>Tips for facilitating quality dialogue</u> as essential preparation.



Alternative workshop outlines

Engaging leaders: what it means to be 'purpose-led'

This link contains <u>three different workshop</u> designs you can use to create a shared understanding of what it means to be purpose-led with teams and groups – in particular (but not exclusively) with leadership teams.

Exploring purpose through a draft purpose statement

This workshop is designed to help a group explore a draft purpose statement to help them:

- deepen the understanding of and commitment to becoming purpose-led
- challenge a team to consider how the purpose statement could shape their strategy, their relationship with stakeholders and their culture
- create shared ownership of the process and a shared view of the intention and motivation that will direct next steps

Exploring the relationships in the Blueprint Principles

This workshop reframes business as a series of relationships. By switching perspective in this way, we can better understand the people on which the business's success depends. This, in turn, can influence strategy development and execution.

Practice 2: Elevate the inquiry

Visioning your purpose-driven industry / sector

Develop from

Ego (Me)

The leader / CEO / business competitive advantage is driving meaning



Towards

Eco (Us)

Societal need and industry relevance is driving the meaning - transcending competition or self-interest

About this practice

This practice invites us to establish an 'outside-in' view of the value our business and sector provides. In other words, to see it and explore its value from the perspective of the public and other stakeholders. Why? Because business gains its licence to operate by meeting the needs of people (and planet), profitably. By being more connected to what stakeholders and society need and expect from our businesses we can:

- stay relevant and clear about our valued role and licence to operate beyond individual activities and actors
- de-personalise and de-politicise what purpose means in critical moments
- catalyse greater collaboration within and across sectors to amplify impact. After all, one person or company can't change a whole system.

Most importantly, this practice invites all of us to be active participants in change, elevating the call to action beyond competition.

Why this practice matters

Too often, the understanding of what 'purpose' means, is anchored in a) the compelling narrative of a visionary CEO, b) a well-communicated statement of purpose that describes an 'ideal' state (containing words like 'thriving', 'happy' and 'growth' or c) competitive advantage and what will make us 'stand out' from the rest.

These work for a time – when the business is prospering, stakeholders are happy and leadership is established and aligned. But what happens when context shifts, difficult trade-offs need to be navigated, challenges emerge, or CEOs leave? Anchoring understanding around individuals or 'ego' inadvertently risks creating 'purpose compliance'; the perfect conditions for people to 'go along with it' without having to explore their own desire, belief and commitment to purpose. By lifting people out of the day-to-day to regularly explore the 'purpose' of business at a higher sector or industry level, we can better see and understand what makes us relevant in the eyes of all stakeholders and what they expect of us. This practice enables us to anchor understanding to something more sustainable and enduring. We elevate our expectations and aspirations of the businesses we work in as citizens, not just employees.



Action

Watch the video of one of the community members talking about their experience of this.



Practice 2: Elevate the inquiry

Example exercise

This 60–90min session can be run in person or virtually. This session is best run in groups of at least four.

What you will need:

- An ability to capture (visually) what the group is contributing (on the template provided – next page).
- SLiDo or Multimeter for very large groups.
- Ideally you can complete this practice with multiple groups at different levels in the organization – and even with groups of external stakeholders.
- An understanding of your audience and desired outcomes.
- A set of purpose-led principles or practices (<u>See Stage 1 'About Purpose-driven Business'</u>) which you can speak to. For the purpose of this exercise, we have used the Blueprint for Better Business framework and provided a video.
- One or two examples of interesting case studies of businesses exemplifying purpose-driven behaviour (ideally from your sector).
- A baseline understanding of the core capabilities of your business / sector
- To test the session out for yourself, so that you can focus on how best to facilitate.
- If you are working with small groups, you may wish to connect for 15-20 mins with each person individually to a) establish a relationship and b) ask them a couple of questions that get them warmed up for the session. For large groups, invite them to read one of your chosen case studies.

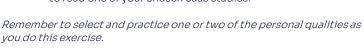


Objectives

- Clarify the unique contribution of your business / sector in society (the why).
- Create a compelling 'vision' for how your business / sector must evolve to meet stakeholder / societal expectations.
- Highlight the gap between where your business / sector is now, and where it needs to be.
- Explore how this impacts meaning in work / pride.

Desired outcomes:

- Pride / belief in our business as a force for good; 'why' we are relevant / meaningful (beyond what we say).
- Clarity of 'how' we need to behave to meet stakeholder needs.
- Greater relatability to stakeholders and ourselves as stakeholders (beyond workers).
- Greater clarity / more sustainable view of how the business should operate.





Example Workshop Outline (60-90mins)

Time	Activity	Lead	Format	Materials
5mins	Welcome & Context Share objectives (above) and agenda Share a case study / story of interesting practice	You or leader host	Plenary	N/A
10mins	Check in: 1. What are you feeling? (one word) 2. Any distractions? 3. I believe the biggest superpower we uniquely possess as a sector / industry today is	All (start with you)	Small groups: Go round the 'room' Large groups: In breakout	Slide: Questions on screen
5mins	Intro to purpose-driven business principles / practice • Walk the group through the principles of a purpose-driven business (click here for A Blueprint for Better Business or click here to play the video).	You (or <u>share the video</u>)	Plenary	Slide: Purpose-driven business principles
10mins	PART I: Our Value Proposition: Purpose-driven XXXX (add industry) If these principles / practices were being exemplified by our sector, what would businesses like ours be doing? What would stakeholders see, feel and experience? (Think back to the check in capabilities shared) (Capture on right of template)	All	Small groups: Go round the 'room' Large groups: In breakout (ideally with a facilitator or SiIDo/ centimeter Map ture) Capture (botton)	Capture on TEMPLATE: (right hand side)
15mins	PART 2: Where is our industry now? – 10mins What is our sector doing now? How do stakeholders experience us now? (Capture on right of template) Where are we as a business now? – 5mins How does our business stack up against this? Are we similar or different? Note: it's important to keep this up at the sector / industry level so don't delve too deep here. Use the process for practice 6 to run a follow up session on how the business might experiment for change).	All		Capture on TEMPLATE: (left hand side) No capture here.
10mins	PART 3: Closing the gap What shared capabilities / superpowers do we uniquely possess as an industry today that might make the future we described possible? What about our industry practice needs to evolve / change / transform to meet this future?	All		Capture on TEMPLATE: (bottom)
5mins	Check out: What are you feeling now? (one word) What has been your biggest insight from today?			Slide: Questions on screen





Practice 2: Elevate the inquiry **Capture template**



Honours its duty to protect the natural world and conserve finite resources

· Contributes knowledge and experience to promote better

Invests in developing skills, knowledge and understanding in wider society to encourage informed citizenship

regulation for the benefit of society as a whole rather

Treats everyone with dignity and provides fair pay for all
 Enables and welcomes constructive dialogue about its

behaviour in keeping true to its purpose

· Fosters innovation, leadership and personal

Protects and nurtures all who work for it to ensure



From Where are we now?	>	Towards Where do we want/need to be?
Add here		Add here

Closi	ng the	e Gap:
Add	ideas	here
	X	
	Χ	

Practice 3: Widen your lens **Exploring dilemmas with a citizen mindset**

Develop from

Defer up

The power is held by or left to the hierarchy to lead and drive action



Towards

Defer out (and within)

The power is shared and action is taken in dialogue with all stakeholders

About this practice

This practice invites us to seek solutions for an issue or opportunity with a broader perspective or worldview than usual. In busy organisational life, it is easy to fall into the trap of only listening to an 'echo chamber' of known parties. Strong hierarchical reporting structures, processes, meetings and deadlines often exacerbate this by taking precious time away from fostering and nurturing wider perspectives, often prioritising efficiency. We get trapped in our 'employee' perspective and find ourselves 'looking up' to powerful leaders for direction and answers. Widening our lens helps to ensure the perspectives we hold in our organisation, and the decisions and actions we take, are relevant and reflective of needs in wider society. Widening our lens takes time, but ultimately results in more artful solutions and robust decisions.

Why this practice matters

Purpose invites us to look outwards, putting stakeholder needs and societal impact at the centre. This invariably invites the complexity of serving a broader set of needs and systemic issues.

Understanding what it means to be purpose-led comes from appreciating how our business treats people in the moments that make or break belief. But often, business is oriented in reverse – with hierarchical structures keeping us 'performing' according to metrics disconnected from the very people that give business its licence to operate. Hierarchies often compound this by dictating 'who' speaks to 'who' and 'when' – cutting us off from the people and relationships we are really in service of.

Even when purpose is the driving force of a charismatic CEO or leader, this orientation can unconsciously create the conditions for 'hero leadership', driving dependency throughout the organisation and unnecessarily reserving decisions to the hierarchy. People become passive consumers of the purpose, deferring to leadership for answers, forgetting their wider role as citizens, customers, community members, parents of future generations and investors. This diversity of perspective is critical. Without it, we limit the potential of the purpose and people by seeking 'simple' and 'surface-level' solutions.



50

Practice 3: Widen your lens

Example exercise

This 60–90min process can be run in person or virtually. This session is best run in a group or team – though it is equally powerful for you individually.

What you will need:

- An ability to capture (visually on screen or flipchart) what the group is contributing (template provided on next page).
- A live issue or opportunity facing those stakeholders and / or the business (ideally one that hasn't been resolved).
- Some understanding of the wider set of stakeholders the business serves or interfaces with – you can use the stakeholder segments illustrated in the exercise.
- A broad understanding of the impact your business seeks to make for stakeholders and society.
- If possible, access to a diverse group of wider stakeholders (not essential).

Remember to select and practise one or two of the personal qualities as you do this exercise.

If you completed <u>practice 2</u> (Elevate the Inquiry), you may want to test your industry vision with the stakeholder needs you identify through this exercise. Thinking about needs beyond ourselves.



Objectives

- See an issue or opportunity in new ways; deepening understanding of what 'purpose' or 'needs-driven' action might mean.
- Connect as 'citizens' in service of the broader roles we play, and relationships we represent (beyond employees).
- Expose how broader perspectives might impact decision-making and action.
- Identify possible partnerships.

Desired outcomes:

- A richer / more diverse network of stakeholder relationships and perspectives to draw on, beyond our organisation.
- A deeper appreciation for the value we do (and don't yet) add.
- An appreciation for bringing more parts of ourselves to our work.
- Greater relatability to stakeholders and ourselves as stakeholders (beyond workers).

Process Explained: Widen your lens (Dilemma Clinic)

Step	Action	Lead
Step 1:	Frame the challenge: Introduce the issue or opportunity (e.g. Cost of Living response) – be as specific as possible	Issue holder
Step 2:	Capture instinctive responses: First write down and then share: Instinctively, what do you think the solution to this issue might be? What is the best action we could take as a business to solve this issue?	Facilitator / scribe
Step 3:	Exploring needs: Then either allocate the stakeholder 'hats' (alongside) to different people in the group – or take each perspective in turn to answer the following questions (get into character!): • Who am I? Who am I representing in this group? • What are my needs and expectations in relation to this issue? Amend the stakeholder groups to create further relevance for your context / business. Ideally you complete this step with actual stakeholder representatives or data.	All
Step 4:	Step back: Ask and capture "What do you notice?" Capture commonalities / differences of needs / expectations between stakeholders. What's new / unexpected? What else is being expressed (non-verbally, even).	Facilitator / scribe
Step 5:	Exploring new options: With this broader view of the needs and expectations surrounding this challenge, ask (and capture): • What actions / solutions might best meet as many of these needs / expectations as possible? • Who isn't being served?	All
Step 6:	Step back: Compare and contrast	Facilitator / scribe

Stakeholder Roles:

Customers / Suppliers/ Community members / Public bodies / Media / Politicians / Future generations / Investors / shareholders / Employees / Union

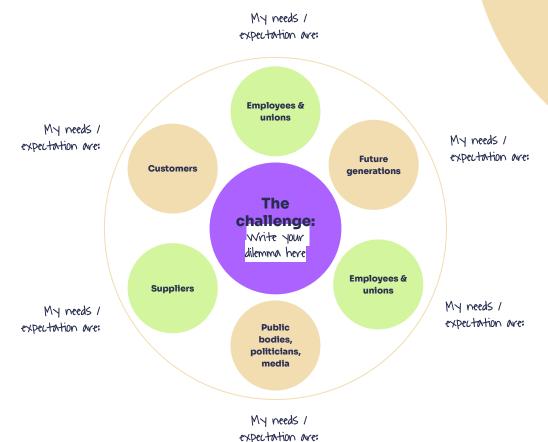
Source: <u>A Blueprint for Better Business</u>



Step	Action	Lead
The next t	wo steps are optional	
Step 7:	Prioritising the path forward: First: Go through each option and ask / answer: Is this something our business should be leading on? What is our role? If not us, then who? Discount options Next: Take each remaining option and look at it in relation to the stakeholder needs and expectations expressed earlier: How does it feel to share this with them? What impact does it have on them (intended / unintended)? What reactions might you expect? Narrow your final options for further testing.	All
Step 8:	Reflection and learning What has been your biggest insight from widening your lens in this way? What new partnerships might be important to solving this challenge? Who do I need to build relationships with?	Facilitator / scribe

Practice 3: Widen your lens

Example exercise



My / our instinctive solution/s

XXX

What do you notice?

General reflections Needs and Expectations Shared needs Diverging needs XXX XXX XXX

Possible solutions to serve the greatest shared need

Option 1	Option 2	Option 3	Option 4
XXX	XXX	XXX	XXX
Who this serves: XXX	Who this serves: XXX	Who this serves: XXX	Who this serves
Who this doesn't serve: XXX	Who this doesn't serve: XXX	Who this doesn't serve: XXX	Who this doesn't serve: XXX

Reflection and learning

- How do these options compare to the 'instinctive' solutions shared at the start of this process?
- What has been your biggest insight from widening your lens in this way?

Practice 4: Lean into tensions Voices from the field

Develop from

Tell & Sell

Tensions are ignored or suppressed as we convince or tell people harder



Towards

Listen & Learn

ension are welcomed to co-create breakthroughs

About this practice

This practice helps us to express and explore divergent views in a contained and empathic way. With more stakeholders and needs to tend to, it's inevitable that there will be conflict or polarisation of views. This practice seeks to embrace that reality and reframe tension as something critical to our understanding of people and purpose. From something we actively avoid, to a superpower for progress and innovation.

Why this practice matters

Shared understanding grows when people feel that their needs and desires are listened to, heard and valued. When they aren't, people disengage and tensions are driven underground. Out of fear of losing momentum, we can fall into the trap of trying to convince people of the 'power of purpose' harder, further suppressing people's concerns. Openly exploring different perspectives on the role of business in society can be uncomfortable and take time – but in the longer-run cultivates a greater understanding and commitment. The most creative efforts are often the result of environments that welcome challenge and hold a range of perspectives in creative tension. It's this tension that, when harnessed, activates real engagement, co-creates meaning and enables breakthrough ideas. In particular, tuning into those people who may seem at first to be cynical can offer insights into the hard but essential work of reorienting your business towards people and the planet.



Practice 4: Lean into tensions **Example exercise**

Background

One of the most powerful ways to build a deep, shared understanding of purpose-led business is to explore where (and for whom) it is already being positively reinforced in an organisation or system – but especially where it comes into conflict. A great way to surface tensions safely, and in a way that shifts perspective, is to invite people to represent the perspective of those with a different view. A simple practice you can use to do this is 'Voices from the Field', which comes from Theory U and the Presencing Institute. In this Playbook, we illustrate the exercise for the purpose of better understanding tensions with purpose-driven business, but it can be used to support and drive change around any issue.

Remember to select and practise one or two of the personal qualities as you do this exercise



Action

Watch the video of one of the community architects talking about the importance of this practice in their work



Objectives

- Surface less popular, often suppressed, perspectives.
- Face uncomfortable truths head-on.
- Expand our listening capability and reflective practice.
- Explore difference as something to be celebrated and as a source of innovation.

Desired outcomes:

- Inclusion. Greater appetite to seek diverse views as the norm.
- Greater empathy, through awareness of how others see the world.
- Deeper, more authentic relationships with and between parties involved.
- Better judged interventions that align with meeting needs (being purpose-led).



Practice 4: Lean into tensions

Example exercise

Voices from the field exercise: Process

Step 1: Select a team / group you wish to build shared understanding with.

Step 2: Invite that group to surface a list of stakeholder names to interview from across their area / organisation. Draw on some of the thinking in Practice 3 (Widen your lens) and encourage them to nominate diverse voices, including those at the fringe or the rarely heard voices. They can be internal and external.

Step 3: Then work with them to construct a set of openended questions that might best surface the interviewee's opinions and perspective on the topic of purpose-driven business.

Step 4: Allocate each member of the group a set of stakeholders (from the list in step 1) to interview and provide instructions for how to conduct the interview for best results – and how to capture notes from each interview. Ensure the questions are 'open' and aim for quality not quantity. There must be sufficient time and space for the interviewee to explore each question. Some example question might be:

- "What does 'purpose-led' mean to you?"
- "What value do we serve as a business?"
- "How does our purpose translate into your everyday behavioural choices?"
- "What would need to happen for purpose to be more of a driver for your decisions?"

NB: Ensure they record answers from stakeholders in their own words, rather than filtering what they said through their own ways of making meaning.

Step 5: Having conducted and captured the interviews, set up a 60-90min session for the group to share their findings. You can do this virtually but it is more powerful if done in person. The aim of this is to help people form a rich, shared mental model of the whole system (thereby coming to see their own perspective as just one in a broad mix). Tensions in perspective invariably emerge but need not be addressed directly yet.

- Invite the group to stand in a circle facing each other.
- In no particular order, each person steps forward to share a perspective from one of their stakeholder interviews – but from the perspective of their chosen stakeholder. e.g. "My name is Frank, I work in department X and my opinion on X is."
- As the facilitator, have an example ready so that you can demonstrate this for the group at the start. Then invite people to start stepping forward into the circle and sharing. Responses need not be addressed or challenged at this stage.
- Ask them to keep sharing until they have said all they want to, ensuring that they take a moment or two after each contribution just to 'take on' that perspective. People can and will go multiple times, sharing what they heard. Again, it's important that they share what they actually heard, rather than what they think people would have said. You might also ask for a three-second pause between inputs from people, in order to keep the temperature low and for each contribution to 'land'.
- When everyone is complete, ask people to reflect in silence on the whole 'field' of perspective that has been created.



Step 6: Sharing reflections and naming tensions

The aim of this section of the process is not to stimulate arguments, nor to reach harmony, but rather to surface the key tensions and differing needs that must be met for purpose to be realised. Invite the group to zoom out and, reflecting on what they heard collectively, start naming the shared needs and tensions surfaced through the exercise. Capture these visually on a flipchart (needs & tensions).

Step 7: Lean into tensions

Take each of the tensions in turn and brainstorm a possible action or mitigant for that tension. You may wish to use a polarity navigator process for this (template on next page).

How this works: Describe the two opposing poles of the tension (as Pole 1 and Pole 2). Brainstorm the benefits and then the 'overuses' of each pole (Pole 1, then Pole 2). Then name a potential 'third way' by answering the questions in the middle of the model. What's possible that achieves the benefits of both poles? What feels risky about holding both poles together? This process ensures that neither tension (or perspective) is wrong. Rather, it acknowledges the benefits of both, and seeks to find a solution that optimises the benefits of both whilst openly acknowledging the downsides and risks.

Practice 4: Lean into tensions

Polarity Navigator template

Step 1: Identify the benefits and overuses of each pole (Left & right boxes)

Step 2: Identify what it would look like to integrate both poles? (middle)

- What are the benefits or upsides of this pole?
- What positive impacts does this pole bring to the situation

Pole 1

Benefits

Overuses

- What are the downsides / consequences overuse in this situation
- What are the early warning signs we have gone too far with this pole?

• What's possible that achieves the benefits of both poles?

 What experience are you creating for others?

Transformational Third Way

- What feels risky about holding both poles together?
- What would be the most uncomfortable part of standing in the Third Way?

What are the benefits or upsides of this pole?

 What positive impacts does this pole bring to the situation

Benefits

Pole 2

Overuses



 What are the early warning signs we have gone too far with this pole?

 ${\color{red} \underline{Source}} : {\color{red} \underline{Polarity Navigator}}; based on \\ the work of {\color{red} \underline{Barry Johnson}}$



Practice 5: Connect catalysts

Building impact networks / communities

Develop from

Expert Taking on the responsibility for having the 'right'

answers



Towards

Enabler

We draw on networks of distributed leaders to lead change

About this practice

This practice outlines tools to help establish and network a community of passionate catalysts who can work alongside you to deepen shared understanding across your organisation and beyond. The complex and systemic change required of purpose-led business happens in a linear, top-down fashion – it evolves through the consistent efforts of formal and informal networks in an organisation convening to co-create solutions around shared goals (see Impact Networks).

In our era of complexity, we need ways of working together that span our traditional boundaries...

Networks are the organising systems that allow our society to function today and can enable us to flourish in the future.



Why this practice matters

Relationships with, and connections between, people are just as important as hierarchical structures in helping to drive complex change – where there are no 'silver bullet' solutions. Too often, the weight of responsibility for driving change is left to an expert few (often the Sustainability, CSR or HR departments), positioning others in the organisation as 'passive consumers' of purpose, not active participants. Rather, building a strong sense of purpose in an organisation involves connecting and galvanising distributed leaders with the right qualities and intrinsic motivation for change, and working with them to nudge the system forward over time. In particular, identifying and connecting people who can value different perspectives, tolerate ambiguity and uncertainty, are resilient to setbacks and are willing to voice uncomfortable views (as well as listen to uncomfortable views), can work together to enable (rather than impose) change. Being an enabler is not associated with where you are in the hierarchy. Becoming an enabler is more about shifting where you place your value at work and the tools you use when interacting with others. It places more emphasis on facilitating a process in others than on achieving a fixed outcome or objective.

Practice 5: Connect catalysts

Building impact networks / communities



In this section, we provide access to and overviews of two excellent community or network building resources. Both provide comprehensive toolkits for establishing and growing groups of connected catalysts – with a clear purpose, principles, strategy and priorities for participation. All the personal qualities will be relevant and necessary for this work.

Objectives

- Identify and connect a community of influential catalysts who share a passion for purpose-driven business transformation.
- Ensure the community / network is set up for success at the outset. Deepen relationships with and between community members with shared motivation and intent.

Desired outcomes:

- A purpose transformation more resilient to shocks and leadership changes.
- Distributed leadership of your purpose-driven business transformation.
- A diverse and distributed group to support wider sensing and innovative problem-solving.
- A support network to lean on for support, council and challenge.

Impact Network Training and Toolkit

Source: <u>Converge</u> (David Ehrlichman, Impact Networks)

Resources

Clarify Purpose And Principles

Network Charter Template
Purpose Stands

Convene The People

Framing Questions
Racial Equity Lens

Cultivate Trust

Group Agreements For Networks
Network Weaving Questions
True Stories

Coordinate Actions

Building an Asset Map Rapid Coordination Tech Tools For Impact Networks

Collaborate For Systems Change

Constructing A Historical Timeline Exploring Future Scenarios Mapping The System

The Enabling Infrastructure

Conducting A Social Network Analysis
Indicators Of Network Health
Network Participant Survey

2 Community Canvas

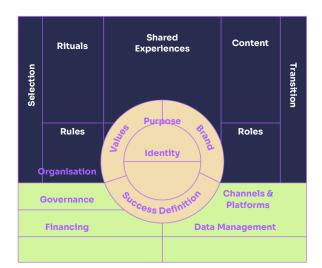
Source: https://community-canvas.org/

Access the <u>full Guidebook here</u> Access the summary Canvas <u>Worksheet here</u> (Also illustrated on the next page)

The Community Canvas has three sections:

- i ne Community Canvas nas three section
 - Identity
 - Experience
 - Structure

These are further broken down into 17 subthemes:



Practice 6: Co-create relevancy **Experimenting with principles, in practice**



Great concept Disconnected from the day to day / core business



Towards

Lived reality

Relevancy is co-created and enacted in day-to-day action

About this practice

This practice helps us to enable and empower others to be in the driving seat of translating and then innovating purpose-driven practice in their own work and contexts. There are 2 parts – 1) helping others work to identify and prioritise the aspects of their organisation that need updating (including structures, processes, decision making approaches etc.) and then 2) helping them experiment to create proof that change is possible.

Why this practice matters

Purpose, by design, touches everything we do and every decision we make - which is both its superpower and its curse in attempting to make it part of our organisational DNA. Given its all-pervasive nature, it follows then that building deep and sustained shared understanding of purpose (within people, processes, propositions and daily practice) takes time – particularly if you are seeking authentic and systemic adoption. This simply cannot be led and left to the responsibility of an expert few (as explored in Practice 5) who could not translate and innovate relevant and relatable change for every person and part of the organisation.

Practitioners of this work often struggle to explain why, despite many people resonating with the philosophy of purpose-driven business, that it doesn't then easily translate into day-to-day decisions and actions. What is less obvious to the naked eye, is the power of the status quo – the old system of assumptions, beliefs, habits and norms - that is covertly running the show. Despite wanting a new and different future, these systemic forces act against our best efforts – largely because they are 1) easier to fall into and validate through past success stories and 2) just too complex to change.

Exploring the deep intent behind what it means to be purpose-led is important (as per <u>Practice 1</u>). However, being overly conceptual or theoretical can result in purpose being understood as too abstract to act upon or change behaviours. To build a deep and sustained shared understanding of purpose (beyond the theory), people need to see and experience that a new way 'is possible around here' (the lived reality).

David Snowden's <u>Cynefin framework</u> and work on complexity teaches us that, when tackling complex problems (like purpose-driven business transformation), the past is not a good predictor of the future. What works in one context, doesn't simply work in another. Instead, we must convene diverse groups - in their local contexts - to experiment, test and learning our way into a new future.

Objectives

- Vision a shared understanding of the future people want to create – what purpose led looks like in their context
- Explore where they are now, against that future (current practice)
- Surface unhelpful patterns of behaviour and operating that that are getting in the way
- Design experiments to innovate pathways towards desired practice

Desired outcomes:

- Greater confidence and connection to how purpose translates into daily practice
- Greater motivation and desire to change (a common mission)
- Personal experience of what it will take to enact purpose-driven change (both personally and in your team / organisational context)

Setup:

- You can run this process for a team, a project, a business area, an organisation or even an industry
- It is best done in teams or diverse groups but you can walk through it yourself to prepare you for working with others
- The 'Resources' column provides a guide or materials to help you run each section. An illustration of how you might capture this process is provided here
- If you have completed <u>Practice 1 'Anchor to Intent</u>' and <u>Practice 2 'Elevate the Inquiry'</u>, you can use the outputs as a starting point for discussion and experimentation)

Remember to select and practise one or two of the <u>personal</u> <u>qualities</u> as you do this exercise.

Practice 6: Co-create relevancy **Experimenting with principles, in practice**

Step	Activity	Resources
Step 1:	Anchor to Purpose Recap (or present) the principles of purpose-led business (example - A Blueprint for Better Business)	Or S <u>hare this</u> <u>video in</u> <u>advance</u>
Step 2:	Invite people to consider a time in the future (ideally 3 or 4 years away) – making it long enough for them to be unlimited in their thinking Ask them to take a moment to imagine that their work / business / whole industry, is an exemplar of purpose-driven business practice. Invite people to share as rich a picture as possible	Read more about <u>this</u> <u>here</u>
Step 3:	Create the future state Now invite them to describe the features (future patterns of behaviour / systems / processes / propositions etc.) of the desired future by asking "If we were exemplifying purpose-led practice, what would stakeholders see, feel and experience?" Capture this the 'Next' column	See 'Next' column in the Capture template
Step 4:	Anchor / acknowledge the current state Now invite them to describe the current state / stakeholder experience: "What do stakeholders see, feel and experience now?" Capture this the 'Now' column Note: This need not be negative. This process encourages us to stretch and innovate our practice from wherever we are today	See 'Now' column in the Capture template You can find an example here
Step 5:	Prioritising options With your 'Now' and 'Next' map created, invite them to prioritise the shifts that they 1) believe will have the biggest impact for stakeholders and 2) they have the most energy to change. Remind the group about the 'vision' they had in Step 2 and challenge them to prioritise areas that will most realise that vision	You may want to use an impact / feasibility matrix for this (2x2)

Practice 6: Co-create relevancy **Experimenting with principles, in practice continued...**

Experiment Design Guide

- ☐ What desired / purpose-driven future are you in service of? (Step 2 & Step 3)
- Where are we now in relation to that future (Step 4)
- What do we need to prioritise to relaise that future (Step 5)
- How can you describe this as a problem or opportunity statement? (Step 6)
- What specific experiment could <u>you</u> run that would address / enable this? (Start small and simple to make it do-able) (Step 7)
- What's your hypothesis / theory of change underpinning this? (e.g If I do X....then Y will happen) (Step 8)
- □ How will you know the impact of your experiment? (What evidence / feedback will you look for and from whom?) (Step 9)
- When might you do this? (Step 10)
- Who else needs to be involved and when and how will you engage them?
- □ How can I help / support you?

DELIVER

DIAGNOSE

Step	Activity	Resources
Step 6:	Designing experiments: Problem statements Having explored the priority areas, invite them to articulate each one into a problem / opportunity statement/s. Who: Who are the stakeholders that are affected by the problem? What: What is the current state, desired state, or unwet need? When: When is the issue occurring or what is the timeframe involved? Where: Where is the problem occurring? For example, is it in a specific department, location, or region? Why: Why is this important or worth solving? How is the problem impacting your customers, employees, other stakeholders, or the organisation?	Writing good problem statements
Step 7:	Designing experiments: Creating hypotheses Now invite the group to turn these ideas into hypotheses or 'theories of change'-in effect, they are statements that say 'We believe that by doing X we may have an impact on Y (through mechanism Z)': (through mechanism Z)':	<u>Writing good</u> <u>hypotheses</u>
Step 8:	Designing experiments: Ideation Use these to brainstorm as many experiment ideas to stimulate change in the current paradigm as possible. This could be a shift in behaviour, process or practice. Get them to explain how each idea shows up in their day-to-day work. This ensures the experiment design is rooted in something 'live' (use real names / scenario) Like a smart goal, experiments need to be specific and actionable (large or small) - something that they have agency to start, that they can track the impact of, and that they can define the limits of in terms of who is going act, where they are going to do it and when, and the point at which they can say it's complete.	Summarise each: Problem / Opportunity Statement Hypothesis Experiment
Step 9:	Pesigning experiments: Assessing Impact Finally, invite the group to explore how they might evidence the impact of their experiments. There are a variety of qualitative and quantitative ways to do this. Note: Don't let perfect be the enemy of the good here. Its more important you get them starting to try something different and to reflect on what they are learning.	Methods for measuring experiments
Step 10:	Delivering experiments Before concluding, be sure the group is clear on who is doing what and when; what support is needed and critically, that they are contracting clearly with whomever they are running experiments (so they expect things to be different!)	

Practice 6: Co-create relevancy

Capture template



Purpose-driven (add team / project here)

_			
Closing Experi	Next Where do we want/need to be?	Now re are we now?	
Experin	If We Were exemplifying purpose in practice, what would stakeholders see, feel and experience?		
Experim			
Experin			

Closing the Gap: Experiments

Experiment 1

Experiment 2

Experiment 3

Thinking about experiments:

- Interventions could be really small or more substantial – but they must be SAFE to FAIL
- Make it a 'journey' not a 'destination' experiment – i.e. something which explores reducing blockers / amplifying enablers to a desired outcome – versus the achievement of the outcome being the goal
- Aim to LEARN not to SUCCEED
- Repeating things that haven't worked before maybe the RIGHT thing to do

Practice 6: Co-create Relevancy **Example**

Purpose-driven **Communication**



From...

Communicating from the business's perspective Single stakeholder view

Good news stories dominate, shying away from difficult issues

Engage on what's going well

One-way, 'one-size-fits-all' comms A one-and-done 'tell'

Saying 'what happened', retrospectively Hear the story

Communicate to colleagues as 'colleagues' – customers as 'customers' etc.

Appeal to 'parts'

Single-issue / point-in-time stories // Issue-in-isolation stories (e.g. customer painpoint)

Create opportunities to voice / raise problems Surface challenges

'Top down' or central comms/campaigns dominate

Control the narrative

Communicate 'answers' / solutions Get people 'bought in' and up-to-date

Towards...

Bring different voices in to highlight different perspectives

Multi-stakeholder view

A more balanced, transparent outlook - exposing the complexities of decisions and trade-offs.

Engage in the issue / complexity

Approaches that engage a conversation /value the nuance $\begin{tabular}{ll} A \ two-way \ dialogue \end{tabular}$

Give voice to stakeholders at an earlier stage Participate in writing the story

Communicate with people – to all their needs / roles they play

Appeal to citizens (holistic)

Stories that expose the wider context and connections $Systemic\ stories\ (e.g.\ housing\ crisis,\ driving\ x\ behaviour\ etc)$

Surface challenges AND possible solutions (it's all of our problem to solve)

Invite innovation / participation

Distributed / networked comms between people Engage in the narrative

Communicate context and questions Get people 'curious' and thinking critically

Experiment 1

Experiment 2

Experiment 3

'Bang...fizz'

Practices for building shared understanding

'Deepen & sustain'

Focus on words

The purpose statement anchors the understanding

Ego

The leader / CEO / Business competitive advantage is driving meaning

Defer up

The power is held by the hierarchy / to lead and drive action

Tell & sell

Tensions are ignored or suppressed as we convince or tell people harder

Expert-led

Taking on the responsibility for having the 'right' answers

Great concept

Disconnected from the day to day / core business



Acknowledge the anchor

Focus on intent

The principles, assumptions & beliefs of purpose-led business anchor the understanding



Elevate the enquiry



Widen your lens



Lean into tensions



Connect catalysts



Co-create relevancy

Eco

Societal need and industry relevance is driving the meaning – transcending competition or self-interest

Defer out (and within)

The power is shared and action is taken in dialogue with all stakeholders

Listen & learn

Divergent perspectives and tensions are surfaced openly to co-create breakthroughs together

Enable

We draw on networks' distributed leaders / stakeholders to lead charge

Lived reality

Relevancy is co-created and enacted in day-to-day action

Critical foundation: Qualities of the 'intervener'

Thanks

